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Form **990-PF**Department of the Treasury  
Internal Revenue Service**Return of Private Foundation**  
or Section 4947(a)(1) Nonexempt Charitable Trust  
Treated as a Private Foundation

OMB No 1545-0052

**2011**

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year 2011 or tax year beginning

, and ending

Name of foundation <b>WAGNER-BRAUNSBURG FAMILY FOUNDATION, INC</b>		A Employer identification number <b>11-3373671</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>6001 MONTROSE ROAD</b>	Room/suite <b>606</b>	B Telephone number <b>301-770-7744</b>
City or town, state, and ZIP code <b>ROCKVILLE, MD 20852</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ <b>2,932,393.</b>	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	30,124.			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	107,624.	107,624.	107,624.	STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	<12,395.>			
	b Gross sales price for all assets on line 6a	80,964.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain			N/A	
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income	<2,723.>	0.	<2,723.	STATEMENT 2	
12 Total. Add lines 1 through 11	122,630.	107,624.	104,901.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees STMT 3	1,004.	0.	0.	0.
	b Accounting fees STMT 4	4,650.	2,325.	0.	0.
	c Other professional fees				
	17 Interest				
	18 Taxes STMT 5	6,435.	6,435.	0.	0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 6	355.	16.	0.	0.
	24 Total operating and administrative expenses. Add lines 13 through 23	12,444.	8,776.	0.	0.
	25 Contributions, gifts, grants paid	149,087.			149,087.
26 Total expenses and disbursements. Add lines 24 and 25	161,531.	8,776.	0.	149,087.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	<38,901.>				
b Net investment income (if negative, enter -0-)		98,848.			
c Adjusted net income (if negative, enter -0-)			104,901.		

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LHA For Paperwork Reduction Act Notice, see instructions.

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**Part II Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing	104,414.	83,502.	83,502.
	2 Savings and temporary cash investments	1,746.	817.	817.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations STMT 8	37,343.	16,991.	21,824.
	b Investments - corporate stock STMT 9	2,161,126.	2,213,537.	2,597,400.
	c Investments - corporate bonds STMT 10	163,373.	124,378.	123,393.
11 Investments - land, buildings, and equipment, basis ▶				
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 11	66,904.	61,418.	105,457.	
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
<b>16 Total assets (to be completed by all filers)</b>	<b>2,534,906.</b>	<b>2,500,643.</b>	<b>2,932,393.</b>	
<b>Liabilities</b>	17 Accounts payable and accrued expenses		4,650.	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	<b>23 Total liabilities (add lines 17 through 22)</b>	<b>0.</b>	<b>4,650.</b>	
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	2,534,906.	2,495,993.	
<b>30 Total net assets or fund balances</b>	<b>2,534,906.</b>	<b>2,495,993.</b>		
<b>31 Total liabilities and net assets/fund balances</b>	<b>2,534,906.</b>	<b>2,500,643.</b>		

**Part III Analysis of Changes in Net Assets or Fund Balances**

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	2,534,906.
2 Enter amount from Part I, line 27a	2	<38,901.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	2,496,005.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 7	5	12.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,495,993.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b SEE ATTACHED STATEMENT				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e 80,964.		93,359.	<12,395.>	
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a				
b				
c				
d				
e			<12,395.>	
2 Capital gain net income or (net capital loss)		2		<12,395.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3		<633.>

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2010	131,270.	2,632,265.	.049870
2009	118,368.	2,387,881.	.049570
2008	128,999.	2,603,793.	.049543
2007	166,829.	2,976,766.	.056044
2006	171,452.	2,959,893.	.057925
2 Total of line 1, column (d)			2 .262952
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 .052590
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5			4 2,946,419.
5 Multiply line 4 by line 3			5 154,952.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 988.
7 Add lines 5 and 6			7 155,940.
8 Enter qualifying distributions from Part XII, line 4			8 149,087.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.  
See the Part VI instructions.

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	1,977.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	1,977.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	5	1,977.
6	<b>Credits/Payments:</b>		
a	2011 estimated tax payments and 2010 overpayment credited to 2011	6a	3,480.
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	3,480.
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9	
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10	1,503.
11	Enter the amount of line 10 to be: <b>Credited to 2012 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input type="checkbox"/>	11	0.

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> <u>DE</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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**Part VII-A Statements Regarding Activities** (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	13	X	
14	The books are in care of ▶ <u>ELIZABETH WAGNER</u> Telephone no. ▶ <u>301-770-7744</u> Located at ▶ <u>6001 MONTROSE ROAD SUITE 606, ROCKVILLE, MD</u> ZIP+4 ▶ <u>20852</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶	16	Yes	No
				X

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	1b	N/A
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	2b	N/A
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2011 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011.)	3b	N/A
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?	4b	X

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**Part VII-B** Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 12		0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000

0

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**Part X** Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	2,915,464.
b	Average of monthly cash balances	1b	75,824.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	2,991,288.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	2,991,288.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	44,869.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,946,419.
6	Minimum investment return. Enter 5% of line 5	6	147,321.

**Part XI** Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	147,321.
2a	Tax on investment income for 2011 from Part VI, line 5	2a	1,977.
b	Income tax for 2011. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,977.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	145,344.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	145,344.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	145,344.

**Part XII** Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	149,087.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	149,087.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	149,087.

**Note.** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

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**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				145,344.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2011:				
a From 2006	26,067.			
b From 2007	20,396.			
c From 2008	28,506.			
d From 2009	466.			
e From 2010	3,127.			
f Total of lines 3a through e	78,562.			
4 Qualifying distributions for 2011 from Part XII, line 4: ▶ \$	149,087.			
a Applied to 2010, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2011 distributable amount				145,344.
e Remaining amount distributed out of corpus	3,743.			
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	82,305.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2010. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2011. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2012				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2006 not applied on line 5 or line 7	26,067.			
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a	56,238.			
10 Analysis of line 9:				
a Excess from 2007	20,396.			
b Excess from 2008	28,506.			
c Excess from 2009	466.			
d Excess from 2010	3,127.			
e Excess from 2011	3,743.			



**Part XV** Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SEE STATEMENT #12				149,087.
<b>Total</b>			▶ 3a	149,087.
b Approved for future payment				
NONE				
<b>Total</b>			▶ 3b	0.



## Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- | 1        | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?  | Yes          | No       |
|----------|--|--------------|----------|
|          |  |              |          |
| <b>a</b> | Transfers from the reporting foundation to a noncharitable exempt organization of:   |              |          |
|          | (1) Cash   | <b>1a(1)</b> | <b>X</b> |
|          | (2) Other assets   | <b>1a(2)</b> | <b>X</b> |
| <b>b</b> | Other transactions:  |              |          |
|          | (1) Sales of <u>assets</u> to a noncharitable exempt organization  | <b>1b(1)</b> | <b>X</b> |
|          | (2) Purchases of assets from a noncharitable exempt organization   | <b>1b(2)</b> | <b>X</b> |
|          | (3) Rental of facilities, equipment, or other assets   | <b>1b(3)</b> | <b>X</b> |
|          | (4) Reimbursement arrangements   | <b>1b(4)</b> | <b>X</b> |
|          | (5) Loans or loan guarantees   | <b>1b(5)</b> | <b>X</b> |
|          | (6) Performance of services or membership or fundraising solicitations   | <b>1b(6)</b> | <b>X</b> |
| <b>c</b> | Sharing of facilities, equipment, mailing lists, other assets, or paid employees   | <b>1c</b>    | <b>X</b> |
| <b>d</b> | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. |              |          |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

- b If "Yes," complete the following schedule.**

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign  
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

Date \_\_\_\_\_

Title

May the IRS discuss this return with the preparer shown below (see instr. 7)?

☒ Yes ☐ No

**Paid  
Preparer  
Use Only**

Print/Type preparer's name

Preparer's signature

Date \_\_\_\_\_

Check ☐ self-employed

PTIN

DONALD J. GOLDSTEIN

8-6-12

P00125876

Firm's name ► CBIZ GOLDSTEIN LEWIN

Firm's EIN ► 34-1900735

Firm's address ► 1675 N. MILITARY TRAIL, FIFTH FLOOR  
BOCA RATON, FL 33486

Phone no. (561) 994-5050

Form **990-PF** (2011)

**Schedule B**(Form 990, 990-EZ,  
or 990-PF)Department of the Treasury  
Internal Revenue Service**Schedule of Contributors**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.

OMB No 1545-0047

**2011**

Name of the organization

Employer identification number

WAGNER-BRAUNSBURG FAMILY FOUNDATION, INC

11-3373671

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)( ) (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

**Special Rules**

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ \_\_\_\_\_

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on Part I, line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2011)

Name of organization

Employer identification number

**WAGNER-BRAUNSBURG FAMILY FOUNDATION, INC****11-3373671****Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<b>1</b>	<b>K. PETER WAGNER</b> <b>5025 COLLINS AVENUE #1709</b> <b>MIAMI BEACH, FL 33140</b>	\$ <b>23,596.</b>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
<b>2</b>	<b>YVONNE R. WAGNER</b> <b>5025 COLLINS AVENUE #1709</b> <b>MIAMI BEACH, FL 33140</b>	\$ <b>5,535.</b>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)



Employer identification number

11-3373671

**Part II    Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed.

[illegible]

Name of organization

Employer identification number

**WAGNER-BRAUNSBURG FAMILY FOUNDATION, INC****11-3373671****Part III**

*Exclusively* religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once) ▶ \$

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

WAGNER-BRAUNSBURG FAMILY FOUNDATION, INC

11-3373671

PAGE 1 OF 1

**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a 300 AMERICAN CAPITAL LTD	P	01/08/07	01/12/11
b 82 AMERICAN CAPITAL LTD	P	08/10/09	01/12/11
c 25000 WELLS FARGO BANK	P	05/20/09	02/01/11
d 20000 NEW ROCHELLE NY	P	03/24/09	05/05/11
e 20000 NEW ROCHELLE NY	P	05/05/11	07/01/11
f FHLMC CMO SERIES	P	VARIOUS	VARIOUS
g CAPITAL GAINS DIVIDENDS			
h			
i			
j			
k			
l			
m			
n			
o			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 2,478.		13,749.	<11,271.>
b 677.		264.	413.
c 25,000.		25,635.	<635.>
d 20,000.		20,352.	<352.>
e 20,000.		20,000.	0.
f 12,726.		13,359.	<633.>
g 83.			83.
h			
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			<11,271.>
b			413.
c			<635.>
d			<352.>
e			** 0.
f			** <633.>
g			83.
h			
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	<12,395.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 }	3	<633.>

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
ENBRIDGE ENERGY PARTNERS, LP	1.	0.	1.
GENESIS ENERGY L.P.	306.	0.	306.
KOONCE SECURITIES, INC.	6,957.	0.	6,957.
MORGAN KEEGAN	88,394.	83.	88,311.
MORGAN STANLEY SMITH BARNEY	12,049.	0.	12,049.
TOTAL TO FM 990-PF, PART I, LN 4	107,707.	83.	107,624.

FORM 990-PF	OTHER INCOME	STATEMENT	2
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ENBRIDGE ENERGY PARTNERS	<1,082.>	0.	<1,082.>
GENESIS ENERGY	<1,674.>	0.	<1,674.>
SHELL SET FUND LITIGATION SETTLEMENT	33.	0.	33.
TOTAL TO FORM 990-PF, PART I, LINE 11	<2,723.>	0.	<2,723.>

FORM 990-PF	LEGAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	1,004.	0.	0.	0.
TO FM 990-PF, PG 1, LN 16A	1,004.	0.	0.	0.

FORM 990-PF	ACCOUNTING FEES			STATEMENT 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	4,650.	2,325.	0.	0.
TO FORM 990-PF, PG 1, LN 16B	4,650.	2,325.	0.	0.

FORM 990-PF	TAXES			STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES - MORGAN KEEGAN	350.	350.	0.	0.
FOREIGN TAXES - MORGAN STANLEY	234.	234.	0.	0.
INCOME TAX EXPENSE	5,851.	5,851.	0.	0.
TO FORM 990-PF, PG 1, LN 18	6,435.	6,435.	0.	0.

FORM 990-PF	OTHER EXPENSES			STATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISCELLANEOUS EXPENSE	29.	0.	0.	0.
REGISTERED AGENT FEE	190.	0.	0.	0.
INVESTMENT ADVISORY FEES	16.	16.	0.	0.
INVESTMENT INTEREST EXPENSE	80.	0.	0.	0.
SECTION 1231 LOSS - GENESIS ENERGY	38.	0.	0.	0.
CONTRIBUTIONS - ENBRIDGE ENERGY PARTNERS	2.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 23	355.	16.	0.	0.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	7
DESCRIPTION		AMOUNT	
GENESIS ENERGY L.P. NONDEDUCTIBLE EXPENSES		7.	
ENBRIDGE ENERGY PARTNERS LP NONDEDUCTIBLE EXPENSES		5.	
TOTAL TO FORM 990-PF, PART III, LINE 5		12.	

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS			STATEMENT	8
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE	
INVESTMENT IN GOVERNMENT BONDS	X		16,991.	21,824.	
TOTAL U.S. GOVERNMENT OBLIGATIONS			16,991.	21,824.	
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS					
TOTAL TO FORM 990-PF, PART II, LINE 10A			16,991.	21,824.	

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
INVESTMENT IN CORPORATE STOCKS		2,213,537.	2,597,400.
TOTAL TO FORM 990-PF, PART II, LINE 10B		2,213,537.	2,597,400.

FORM 990-PF	CORPORATE BONDS	STATEMENT	10
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
INVESTMENT IN CORPORATE BONDS		124,378.	123,393.
TOTAL TO FORM 990-PF, PART II, LINE 10C		124,378.	123,393.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	11
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
INVESTMENT - OTHER	COST	61,418.	105,457.
TOTAL TO FORM 990-PF, PART II, LINE 13		61,418.	105,457.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	12
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
ELIZABETH S. WAGNER 9316 WINTERSET DRIVE POTOMAC, MD 20854	PRESIDENT 0.00	0.	0.	0.
K. PETER WAGNER 5025 COLLINS AVENUE MIAMI BEACH, FL 33140	VICE PRESIDENT 0.00	0.	0.	0.
YVONNE R. WAGNER 5025 COLLINS AVENUE MIAMI BEACH, FL 33140	VICE PRESIDENT 0.00	0.	0.	0.
CHARLES H.S. WAGNER 5 GEDNEY ESPLANADE WHITE PLAINS, NY 10605	VICE PRESIDENT 0.00	0.	0.	0.
WAYNE L.B. WAGNER 401 NORTHWEST DRIVE SILVER SPRING, MD 20901	VICE PRESIDENT 0.00	0.	0.	0.
JASON LIEBERMAN 9316 WINTERSET DRIVE POTOMAC, MD 20901	VICE PRESIDENT 0.00	0.	0.	0.
MICHAEL LIEBERMAN 9316 WINTERSET DRIVE POTOMAC, MD 20854	VICE PRESIDENT 0.00	0.	0.	0.
ANDREW L. MANN 4300 N UNIVERSITY DRIVE, SUITE C-203 SUNRISE, FL 33351	TREASURER 0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

**CONTRIBUTIONS made by Wagner-Braunsberg Family Foundation, Inc.**

		Purpose	Amount 2011	Date	Check #
<b>Greater Miami Jewish Federation</b>		annual campaign	\$ 1,000.00	2/9/11	2004
4200 Biscayne Boulevard , Miami Beach, FL 33137-3729					
<b>Mount Sinai Medical Center Foundation</b>		founders pledge	\$ 5,000.00	2/9/11	2005
Ascher Building, 4300 Alton Road, Miami Beach, FL 33140					
<b>Jewish Museum of Florida</b>		annual campaign	\$ 1,800.00	2/25/11	2006
301 Washington Avenue, Miami Beach, FL 33139					
<b>The Jewish Foundation for Group Homes</b>		generator for group home	\$ 9,000.00	4/22/11	2010
1500 East Jefferson Street, Rockville, MD 20852					
<b>Washington Hebrew Congregation</b>			\$ 2,565.00	7/12/11	2013
3935 Macomb Street Northwest Washington DC					
<b>Temple Beth Shalom</b>			\$ 3,322.00	7/12/11	2014
4144 Chase Avenue, Miami Beach, FL 33140-3431					
<b>Jewish Foundation for the Righteous</b>		support of Christians who rescued Jews	\$ 100.00	7/12/11	
305 Seventh Ave 19 Fl NY NY 10001-6008					
<b>Temple Shalom</b>			\$ 3,000.00	7/18/11	2016
8401 Grubb Road, Chevy Chase MD 20815					
<b>Anti-Defamation league</b>		struggle against semitism	\$ 5,000.00	9/19/11	2018
1100 Connecticut Avenue NW, Suite 1020, Washington, DC 20036					
<b>Anti-Defamation league</b>		struggle against semitism	\$ 40,000.00	12/27/11	2057
1100 Connecticut Avenue NW, Suite 1020, Washington, DC 20036					
<b>American Technion Society</b>		research Nanosciences	\$ 50,025.00	9/19/11	2017
7315 Wisconsin Avenue Suite 800E, Bethesda, MD 20814					
<b>The Jewish Foundation for Group Homes</b>		donation	\$ 7,500.00	9/19/11	2020
<b>The Jewish Foundation for Group Homes</b>		TV donation / Reim Liz	\$ 725.30	12/27/11	2058
1500 East Jefferson Street, Rockville, MD 20852					
<b>Children's Inn at NIH</b>		Family gift card program for groceries	\$ 1,000.00	9/19/11	2019
7 West Dr Bethesda MD 20814-1509					
<b>Melvin Berman Hebrew Academy</b>		in honor of Samuel Bobrow	\$ 750.00	9/21/11	2021



13300 Artic Ave. Rockville MD 20853

## The Smile Train

41 Madison Avenue, 28th Floor, New York, NY 10010

**Leo Baeck Institute**

15 West 16th Street, New York, NY

**Leo Baeck Institute**

15 West 16th Street, New York, NY

**Michael J. Fox Foundation**

Church Street Station P O, Box 780, New York, NY 10008

**Michael J. Fox Foundation**

Church Street Station P O Box 780, New York, NY 10008

**Jewish Institute for National Security Affairs**

1307 New York Avenue, Suite 200 Washington DC 20005

## World Jewish Congress

PO Box 90400, Washington, DC 20090-0400

## Blue Card

171 Madison Avenue, New York, N.Y. 10016

**Mazon**

10495 Santa Monica Blvd, Suite 100, Los Angeles, CA 90025

## Friends of Israel Defense Forces

3177 Glades Rd , 208 Boca Raton FL 33434

**Selfhelp Community Service**

P.O. Box 1436, New York, N.Y. 10138-1405

**Jewish Foundation for the Righteous**

605 Seventh Avenue, 19th Floor, New York, N.Y. 10001-6008

**3'nai Brith International**

2020 K St. Washington DC 20006

## Project Keshar

144 Ashland Ave, Suite 3, Evanston, IL 60201

## US Holocaust Museum

cleft palate operation for children	\$ 500.00	10/12/11	2012
donation	\$ 200.00	10/12/11	2022
donation	\$ 100.00	12/19/11	2053
Parkinson's research	\$ 1,000.00	10/12/11	2023
Parkinson's research	\$ -		
donation	\$ 500.00	10/12/11	2024
donation	\$ 100.00	10/12/11	2025
support for Holocaust survivors	\$ 100.00	10/12/11	2026
Jewish response to hunger	\$ 100.00	10/12/11	2028
donation	\$ 100.00	10/12/11	2029
donation	\$ 100.00	10/12/11	2030
support of Christians who rescued Jews	\$ 100.00	10/12/11	2032
in honor of Rose Closter's 95th Bday	\$ 300.00	10/12/11	2033
training for women	\$ 500.00	10/12/11	2027
Wings of Memory Society	\$ 1,000.00	12/15/11	2040

100 Raoul Wallenberg Place SW, Washington, DC 20024-2126

**The New School for Social Research Annual Fund**

79 Fifth Avenue 17th Fl NY NY 10003

**HADASSAH**

50 West 58th St NW NY 10019

**Hebrew Immigrant Aid Society**

333 Seventh Avenue 16th Fl NY NY 10001-5019

**American Committee for the Weizmann Institute of Science**

633 Third Avenue, New York, NY 10017

**The Kindertransport Association of North America**

36 Dean St Hicksville NY 11801-5852

**Hebrew Union College**

3101 Clifton Ave. Cincinnati OH 45220-2488

**American Jewish Committee**

1156 15 St NW Suite 1200 Washington DC 20005

**Temple Shalom**

8401 Grubb Road, Chevy Chase MD 20815

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8401 Grubb Road, Chevy Chase MD 20815

**Temple Shalom**

8401 Grubb Road, Chevy Chase MD 20815

**Temple Beth Shalom**

4144 Chase Avenue, Miami Beach, FL 33140-3431

**Temple Beth Shalom**

4144 Chase Avenue, Miami Beach, FL 33140-3431

**Temple Beth Shalom**

4144 Chase Avenue, Miami Beach, FL 33140-3431

donation \$ 400.00 12/15/11 2041

donation \$ 100.00 12/15/11 2039

Donation \$ 100.00 12/15/11 2038

Masters scholarship \$ 1,000.00 12/14/11 2044

donation \$ 100.00 12/14/11 2042

Memory of Prof. Jacob Petakowski \$ 100.00 12/15/11 2045

donation \$ 100.00 2043

gift donation Cantor Music Fund \$ 500.00 12/15/11 2037

Rabbi Fishbach's Mitzvah Fund \$ 500.00 12/14/11 2034

Rabbi Ackerman's Mitzvah Fund \$ 300.00 12/14/11 2036

Cantor's Mitzvah Fund \$ 500.00 12/15/11 2035

Rabbi Glickstein's Mitzvah Fund \$ 1,000.00 12/15/11 2048

Cantor Siegel's Music Fund \$ 500.00 12/15/11 2046

Rabbi Davis's Mitzvah Fund \$ 300.00 12/15/11 2049

<b>Temple Beth Shalom</b>	Rabbi Pomerance's Mitzvah Fund	\$ 300.00	12/15/11	2050
4144 Chase Avenue, Miami Beach, FL 33140-3431				
<b>Temple Beth Shalom</b>	Cantor Siegel's Music Fund	\$ 300.00	12/15/11	2047
4144 Chase Avenue, Miami Beach, FL 33140-3431				
<b>American Friends of Magen David-Adom</b>	towards bomb shelter /blood bank	\$ 5,000.00	12/19/11	
2100 E Hallandale Beach Blvd, Suite 205, Hallandale, FL 33009				
<b>Foundation for Jewish Studies</b>	donation	\$ 2,500.00	12/30/11	
2011 Donations Due 5% on balance of 12/31/2010 \$ 2,953,630.00 =				
<b>\$147,681.50</b>	<b>Total:</b>	<b>\$149,087.30</b>		
Donation 2011				

## Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

► File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

**Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.**

**Electronic filing (e-file).** You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*.

### Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension—check this box and complete Part I only ☐

*All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.*

Enter filer's identifying number, see instructions

Type or print  File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions	Employer identification number (EIN) or
	Wagner-Braunsberg Family Foundation, Inc.	<input checked="" type="checkbox"/> 11-3373671
	Number, street, and room or suite no. If a P.O. box, see instructions	Social security number (SSN)
	c/o CBIZ Goldstein Lewin, 1675 N Military Trail, Fifth Floor	<input type="checkbox"/>
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	Boca Raton, FL 33486	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	01	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ► CBIZ Goldstein Lewin

Telephone No. ► 561-994-5050 FAX No. ► 561-241-0071

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until August 15, 20 12, to file the exempt organization return for the organization named above. The extension is for the organization's return for
- ☒ calendar year 20 11 or

► ☐ tax year beginning \_\_\_\_\_, 20 \_\_\_\_\_, and ending \_\_\_\_\_, 20 \_\_\_\_\_

- 2 If the tax year entered in line 1 is for less than 12 months, check reason. ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	\$	0 00
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit	3b	\$	0 00
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	3c	\$	0 00

Caution: If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form **8868** (Rev. 1-2012)

• If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

• If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Enter filer's identifying number, see instructions

Type or print  File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions	Employer identification number (EIN) or
	Wagner-Braunsberg Family Foundation, Inc	<input checked="" type="checkbox"/> 11-3373671
	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)
	C/O CBIZ Goldstein Lewin, 1675 N Military Trail, Fifth Floor	<input type="checkbox"/>
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	Boca Raton, FL 33486	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990	01		
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	01	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

• The books are in the care of **CBIZ Goldstein Lewin**

Telephone No. **561-994-5050**

FAX No. **561-241-0071**

• If the organization does not have an office or place of business in the United States, check this box ☐

• If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

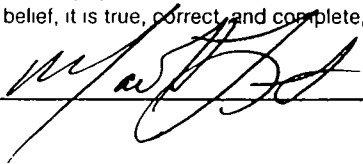
- 4 I request an additional 3-month extension of time until **November 15**, 20 **12**
- 5 For calendar year **2011**, or other tax year beginning \_\_\_\_\_, 20 \_\_\_\_\_, and ending \_\_\_\_\_, 20 \_\_\_\_\_
- 6 If the tax year entered in line 5 is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period
- 7 State in detail why you need the extension **All information necessary to file a complete and accurate return is not available**

8a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	0.00
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	0.00
c	<b>Balance due.</b> Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.00

**Signature and Verification must be completed for Part II only.**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ▶



Title ▶ CPA

Date ▶ 08/06/2012